COMMUNITY ASSESSMENT
A SUMMARY OF CONDITIONS AND TRENDS

Athens Clarke County, Georgia
Community & Economic Development Strategic Plan

MARCH 2017
This report provides background information to assist with the development of the Community and Economic Development Strategic Plan.

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Community Assessment
Envision Athens

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The Envision Athens Process

Preparation for the planning process started in October of 2016 and will last approximately one year. The three rounds of engagement and overlaying research and analysis have been illustrated in the graphic below. Engagement activities are meant to be iterative, building from one round to the next. Research and analysis task break into two major components: 1) A general scan of key conditions and trends specific to the Athens-Clarke County community, and 2) A targeted analysis of specific community phenomena either unveiling through the engagement activities or through the more general analysis.

Types of Activities
- Large public workshops
- Small public meetings
- Online engagement
- Small focus groups
- Stakeholder meetings
1. Introduction

Athens-Clarke County is a diverse and dynamic community. It’s people, economy, and places all contribute to a vibrant and unique environment. There are great assets to protect and leverage, but also challenges to overcome. Envision Athens is a community-wide effort to develop a common vision for the future of the Athens-Clarke community. This process will result in a visionary, yet achievable multi-dimensional strategy to guide community and economic development for the next 20 years. Input from the community —through a range of engagement activities—will guide this work and be bolstered by strong technical research and analysis.

A Snapshot of Conditions and Trends

This report provides an overview of key conditions and trends for the Athens-Clarke County community. It is the first of a two-part approach to analysis for Envision Athens Community and Economic Development Strategic Plan. It is intended to create a foundation of understanding about the future and help to identify topics where more detailed analysis should be undertaken as part of the targeted analysis phase.

Key Findings

The following describes the key findings from the conditions and trends research and analysis. These items and other findings will be expanded on throughout the report.

**Prosperity**

Facts and figures summarizing personal prosperity, economic vitality, education, and health

<table>
<thead>
<tr>
<th><strong>PRIVATE SECTOR JOBS</strong></th>
<th><strong>48,000</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Moderate increase of eight percent from 2005, major shift from manufacturing to health care</td>
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</table>

<table>
<thead>
<tr>
<th><strong>POVERTY RATE</strong></th>
<th><strong>36.7%</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>The County has the 4th highest poverty rate in Georgia, adjusted for the student population the rate is ~28.4%</td>
<td></td>
</tr>
</tbody>
</table>

**Place**

Place-based conditions and trends on topics like housing, development character, land use and mobility

<table>
<thead>
<tr>
<th><strong>NEW WORKFORCE HOUSING CONSTRUCTION, 2005-15</strong></th>
<th><strong>11%</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Between 2005 and 2015, a small share of workforce housing constructed, majority of growth in student, multifamily</td>
<td></td>
</tr>
</tbody>
</table>

**People**

Demographic conditions and trends related to population, household makeup, age, and diversity

<table>
<thead>
<tr>
<th><strong>CHANGE IN POPULATION</strong></th>
<th><strong>+22.3%</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Between 2000 and 2015, the county’s population has increased by 22,000, 19th largest county in Georgia</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>MEDIAN AGE</strong></th>
<th><strong>26.5</strong></th>
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<tbody>
<tr>
<td>Half of the County’s population under the age of 26</td>
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Learn more about Envision Athens online!

To find out more about the process, see upcoming community events, or share your thoughts on this document, head to [www.EnvisionAthens.org](http://www.EnvisionAthens.org). You can also like the process on facebook at [www.facebook.com/envisionathens](http://www.facebook.com/envisionathens) or by searching “Envision Athens” in the facebook search bar.
2. People

Athens-Clarke County is a growing community with a diverse and younger population. More than 20,000 new residents were added since 2000. Household make-up and ethnic/racial diversity are changing as well. The University of Georgia’s presence means a much larger share of young people and as the institution grows so will their impact. The chapter provides a snapshot of key conditions and trends as they pertain to the demographics of the county.

Key Findings

The following are key points from the demographics research of the county.

**POPULATION TREND**

+22.3%

Between 2000 and 2015, the population increased by more than 20,000, Georgia grew by 25%.

**RESIDENTS UNDER THE AGE OF 26**

50%

With more than 40,000 college students, the community has an extremely low median age at 26.5, Georgia is 33.4.

**CHANGE IN THE HISPANIC/LATINX POP.**

98.4%

From 2000, more than 6,000 new residents were added to the Hispanic/Latinx community, Georgia’s share is growing slightly faster at 110%.

POPULATION

**Strong population growth.** The county has experienced growth in every decade since 1900. Steady growth, ranging between 14 and 18 percent, has been the trend since 1970. Between 2000 and 2015 the county added an additional 7,000 residents. Forecasts predict continued, linear growth well into the 21st century.

**Consolidation merged the city of Athens and Clarke County.** After several attempts starting in the mid-60s, the city and county officially unified on August 7, 1990 through referendum. As indicated by the graph right, the population jump from 1990 to 2000 for the “city of Athens” is artificial, as the two bodies merged in that decade. Athens-Clarke was the second county in the state of Georgia to unify, and 28th in the country.

**FIG 1. POPULATION CHANGE & FORECAST, 1960-2030**

Source: U.S. Census, American Communities Survey, University of Georgia, Georgia Governor’s Office of Planning and Budget
HOUSEHOLDS

Single-person households are the fastest growing type. Dwellings with a single household grew by 27 percent from 2000, and now represent 34 percent of the overall share of household types. This was the largest growth of any segment, and likely driven by the community’s younger overall population and major university.

Family households with children under 18 in decline. While the overall number of households increased by 3,600 from 2000, and the family segment remained relatively stagnant (49 percent), householdes with children under 18 declined by about 40 percent or 3,600 families.

Smaller household size. Even with a slight increase in household size from 2000 from 2.35 to 2.55, the county has a smaller average household size than the state, 2.66. Household size refers to all cohabitation, not just families.

Fewer single-parent households. A modest decline from 2000 of four percent or 200 fewer single-parent households. In Georgia this segment grew by 20 percent.

FIG 2. SHARE OF POPULATION BY AGE COHORT

Understanding Households...
The following definitions related to households are used by both the US Census Bureau and Department of Housing and Urban Development (HUD).

what is a household (HH)?
A person or group of people living together in one housing unit.

what is a housing unit?
A house, apartment, mobile home, group of rooms or single room, which are intended as separate living quarters.

what is a family household?
A group of two or more people living together in a housing unit who are related by birth, marriage, adoption, etc.

FIG 2. SHARE OF POPULATION BY AGE COHORT

Older Adult (65 plus)
Adult (45 to 64)
Young Adult (25 to 44)
College Age (18 to 24)
School Age (5 to 17)
Preschool (0 to 4)

A very young population overall. With a median age of 26.5, the community is nearly ten years younger than that state, 35. This means half of the county’s population is under the age of 26. The 40,000 college students (aged 18 to 24), plays a major role. The graph to the left shows the 20 percent difference between this age segment and the state.

Over-65 the fastest growing cohort. While extremely young overall, the fastest growing age segment is the over-65 population. Between 2000 and 2015 this cohort grew by 38 percent, faster than any other. Second fastest, was the “Adult” or 45 to 64 population, adding 5,400 new individuals. The state’s over-65 population grew by 52 percent over this period.

Source: U.S. Census, American Communities Survey
DIVERSITY

An increasingly diverse community.
As the population increased from 2000 by more than 20,000 individuals, the community’s racial and ethnic make-up was transformed. The overall share of the minority population has increased for each measured group, other than Black or African American. While this segment grew by 18 percent, its share of the overall population decreased from 27 to 26 percent. This was offset by gains in the Asian, Some other race, and Two or more races categories. Note, the Hispanic / Latinx* designation tallies under “ethnicity” and is not measured in the overall share of racial groups.

Growth of the Hispanic / Latinx* community. This was the fastest growing minority segment between 2000 and 2015, nearly doubling in size and adding more than 6,300 new residents. This trend is mirrored by the state, where the increase was 110 percent. This growth in the local share, correlates and is also captured in the increase in the foreign born population. A recent survey (2016) found 85 percent of the Hispanic / Latinx population are foreign born with 52 percent immigrating from Mexico. This same survey found, 41% of families live in mixed immigration status homes.

Large foreign-born population.
This segment grew by 42 percent from 2000. The largest proportion, 53 percent, immigrated from Latin American, 33 percent from Asia, and ten percent from Europe.

Race and Ethnicity
Ethnicity and race are sometimes – but not always – synonymous. For example, the Census Bureau considers “Hispanic or Latinx” to be an ethnic designation, but it considers “African American” to be a racial designation. A person may identify with one or both. An ethnicity is often a social classification whereas race is primarily defined by physical characteristics.

*Latinx?
Refers to the gender-neutral version of Latino or Latina.

FIG 3. RACE, ETHNICITY AND ORIGIN CHANGE FROM 2000

FIG 4. RACE, ETHNICITY AND ORIGIN OVERALL SHARE

<table>
<thead>
<tr>
<th>Athens-Clarke County</th>
<th>Georgia</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2015</td>
</tr>
<tr>
<td>White</td>
<td>78,234</td>
</tr>
<tr>
<td>Black or African American</td>
<td>32,110</td>
</tr>
<tr>
<td>Asian</td>
<td>5,323</td>
</tr>
<tr>
<td>Some other race</td>
<td>2,470</td>
</tr>
<tr>
<td>Two or more races</td>
<td>2,496</td>
</tr>
<tr>
<td>Hispanic (of any race)</td>
<td>12,770</td>
</tr>
<tr>
<td>Foreign-born</td>
<td>12,120</td>
</tr>
</tbody>
</table>

Source: U.S. Census, American Communities Survey

CONTINENT OF ORIGIN, FOREIGN BORN

CHANGE IN THE HISPANIC/LATINX POP.

98.4%

From 2000, more than 6,300 new residents were added to the Hispanic/Latinx community, Georgia’s share is growing slightly faster at 110%
3. Prosperity

The prosperity story in Athens-Clarke County is complicated. While many places can only dream of this community’s unemployment rate, wage growth has stagnated and the poverty rate remains high. A major shift in dominant employment sectors began in the 2000’s and continues to this day. The local economy is driven by the University of Georgia, and its 10,000 jobs. The prosperity chapter includes analysis these economic conditions and trends.

Key Findings

The following are key points from the economic research of the county.

**UNEMPLOYMENT**

4.5%

A steady decline in unemployment from the recession, figure now likely represents full employment.

**EGA EMPLOYEES**

10,370

The County’s largest single employer is the University of Georgia, roughly one job per 3.5 students.

**POVERTY RATE**

36.7%

Fourth highest in Georgia, but when adjusted for the large student population, the rate is roughly 28.4%

ECONOMY & EMPLOYMENT

Major shift in the dominant employment sector. There were 48,000 covered private sector jobs in 2015. Largest private sector employers include Health Care & Social Assistance, Retail Trade, and Accommodation & Food Services. These three sectors represent 55 percent of total covered private employment. Self employment estimates add another 16,500 jobs.

University of Georgia the largest employer. jobs in this one institution are comparable to the total jobs in the largest private sector (Health Care & Social Assistance). University reported data in 2015 notes a total of 10,370 jobs. The University is a top research engine in the state of Georgia with $230 million in annual R&D expenditures.

Source: U.S. Census, American Communities Survey

FIG 5. CHANGE IN JOBS BY SECTOR, 2005-2015

<table>
<thead>
<tr>
<th>Sector</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction</td>
<td>-2,047</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>-368</td>
</tr>
<tr>
<td>Wholesale trade</td>
<td>+1,340</td>
</tr>
<tr>
<td>Retail trade</td>
<td>+540</td>
</tr>
<tr>
<td>Information</td>
<td>+663</td>
</tr>
<tr>
<td>Finance &amp; insurance</td>
<td>+141</td>
</tr>
<tr>
<td>Real estate &amp; rental and leasing</td>
<td>+120</td>
</tr>
<tr>
<td>Professional &amp; technical services</td>
<td>+134</td>
</tr>
<tr>
<td>Administrative &amp; waste services</td>
<td>+2,089</td>
</tr>
<tr>
<td>Health care &amp; social assistance</td>
<td>+1,297</td>
</tr>
<tr>
<td>Accommodation &amp; food services</td>
<td>+516</td>
</tr>
<tr>
<td>Other services</td>
<td>+567</td>
</tr>
<tr>
<td>Other sectors</td>
<td>-2,45</td>
</tr>
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<td>Other sectors</td>
<td>-567</td>
</tr>
<tr>
<td>Other sectors</td>
<td>-368</td>
</tr>
</tbody>
</table>

Source: U.S. Census, American Communities Survey
Manufacturing remains a significant, if volatile sector. Manufacturing is the fourth largest private sector in terms of employment with 5,924 in employment. Top manufacturing employers include: Pilgrim’s Pride (1,800 jobs), Caterpillar (1,700), Power Partners Inc (480), Baldor (480), Carrier Transicold (450), Merial (450), and Burton & Burton (300).

Hospitals and health care are regional assets. Offsetting the losses in Manufacturing (-2,047), the Health Care and Social Assistance sectors experienced a large gain (+2,089) in employment from 2005 (see figure 5). This is the largest employment sector today. Just between major hospitals Athens Region Medical Center and St. Mary’s Health Care System there are 5,000 jobs.

Covered jobs have grown by eight percent since 2005. The greatest gains were in health care & social assistance and greatest losses were in manufacturing. These trends mirror changes in the state as a whole though Athens-Clarke County shed more manufacturing jobs as a percentage than the state (-26 compared to -17 percent). Chemical manufacturing shed about 1,000 jobs.

Self employment increasing. Estimated self-employment has grown faster, by 35 percent since 2005. The greatest gains were in Administrative & Support, other services, and Real Estate & Rental and Leasing. Manufacturing and Construction were the only sectors to lose jobs with an 8 and 23 percent decline respectively.

PRIVATE SECTOR JOBS  
Includes covered jobs, or non-self-employed jobs. Including self-employment would add an additional 16,000 jobs

ECONOMIC OUTPUT (GDP)  
2015 measure of economic output is the quantity of goods and services produced in a given period by a firm, industry or geography.

MANUFACTURING JOBS  
Manufacturing in the county remains relatively strong despite the loss of just over 2,000 jobs from 2005

OCCUPATIONS  
The University is dominates in terms of resident occupations. The County has a higher occupational share than the national average in fields related to the higher education, for example life, physical and social sciences, with a location quotient of 4.2. Location quotient is a method of quantifying how concentrated a particular industry, cluster, occupation, or demographic group is in a region as compared to the nation.

OCCUPATIONS  
Significant increase in service occupations. In a 5-year comparison with data from 2010, there has been a statistically significant increase in service occupations (from 19.9 of the labor force to 22.2 percent) and a significant decline in workers in construction (5.2 to 3.4) and public administration (3.7 to 2.9).

FIG 6. OCCUPATIONS OF RESIDENTS

FIG 7. MAJOR EMPLOYERS

Source: U.S. Census, American Communities Survey
LAbor & Workforce

County workforce is shrinking. From 2000 to 2016, the county’s workforce participation rate decreased from 56.3 to 64.8 percent. At the same time, the share of residents claiming Social Security disability benefits increased. A higher percentage of Athenians (18.4 compared to 16.7 percent) claim these benefits compared to the state.

Employers pull from a large, multi-county region. Each day more than 40,000 workers commute into the community. Of these, 35 percent travel more than 25 miles. This has increased over time. 18,000+ residents commute out of the county each day, and just over 20,000 live and work in the county.

Full employment in the county, but not for everyone. The county’s unemployment rate, 4.5 percent for the fourth quarter of 2016, is the second lowest of any MSA in the state of Georgia and effectively represents full employment. While the overall figure is extremely low, the rate among African American workers is just over 13.4%, triple the national average in 2016.

Innovation & Entrepreneurship

Growing number of small firms. The number of firms has grown by 15 percent since 2005 (from 5,624 to 6,271). 68 percent of businesses in the county have between 2 and 9 employees. This has slowed recently and decreased by two percent between 2014 and ’15.

Etsy and Kickstarter indicate a strong arts entrepreneurial scene. The online markets provide another view into new entrepreneurs, particularly for artists and craftspeople. In early 2017, residents of Athens-Clarke County had posted 268 campaigns on Kickstarter. Of these 108 of the campaigns were for music.

Large share of utility patents. Utility patents are a key measure of innovation capacity. A utility patent is issued for “the invention of a new and useful process, machine, manufacture, or composition of matter, or a new and useful improvement”. Inventors in Athens-Clarke County have filed 411 utility patents since 2000, which represents two percent of state total. The county is the 8th highest producing in Georgia.

share of firms with 2 to 9 employees

68%
The total number of firms increased by 15 percent from 2005, a heavy majority of this growth was in small business

Total utility patents from 2000

411
The county was the 8th highest producer of patents over this period
PERSONAL PROSPERITY

More than one in three residents live in poverty. Using the raw calculation (see box) close to 37 percent of residents live below the poverty line. This figure does include some, but not all of the college aged population in its calculation. When corrected for this segment the rate decreases to 28 percent still in high half of Georgia counties. Regardless of the correction, every age segment (see below) has a higher rate of persons in poverty and has increased from 2000. Only the over-65 cohort ties the state and decreased from 2000.

Highest instances of poverty for school aged children. Close to 40 percent of children aged 5 to 17 live in poverty, an increase of more than 90% from 2000. The state saw increases in the segment, but more modest. 25 percent of Georgia children are in this category.

POVERTY RATE

36.7%

The raw poverty rate for the county is the fourth highest in the state of Georgia. The presence of 40,000 college students, however, mildly skews this statistic.

ADJUSTED POVERTY RATE

~28.4%

After removing the balance of college age residents from the measure the poverty rate decreases by eight points, and is middling compared to Georgia 159 counties.

Increase in households with children receiving food stamps. Between 2003 and 2013, 3,700 new households were receiving food assistance, or stamps. This represented an increase of 183 percent over this period.

Decline in home ownership. The majority of residents, close to 61 percent, rent versus own their homes. This increased 23 percent from 2000.

Poverty Rate Calculation

The poverty rate refers to the percentage of the population whose household income falls below the nationally-calculated Poverty Thresholds. If a household’s total (pre-tax) income is less than the corresponding threshold, all members of that family are considered to be in poverty. Thresholds are determined according to family size: for example, the threshold income for a family of four (with two children) is $24,008. The threshold for a single person under the age of 65 is $12,071. (Source: US Census)

The threshold to qualify for the School Breakfast and Lunch Programs in Alabama is higher (more generous) than the federal poverty threshold. For example, a family of four must have a household income under $44,955 to qualify for free or discounted meals.

Increase in households with children receiving food stamps. Between 2003 and 2013, 3,700 new households were receiving food assistance, or stamps. This represented an increase of 183 percent over this period.

Decline in home ownership. The majority of residents, close to 61 percent, rent versus own their homes. This increased 23 percent from 2000.

FIG 8. POVERTY AS A PERCENTAGE BY AGE SEGMENT, 2000–2015

Source: U.S. Census, American Communities Survey
EDUCATIONAL ATTAINMENT

General improvements in educational attainment. From 2000 there was a 30 percent increase in residents with at least an Associates Degree. This is equivalent to just over 7,100 individuals. Accordingly, fewer residents today are without a High School Degree (19 percent in 2000, 14 percent today).

A diverse community with an even more diverse district. Reflecting the surrounding community, the Clarke County School District is quite diverse. African American students represent half of enrolled students with Hispanic and Latinx students making up 24 percent, White students 21 percent and Asian and Multi-racial students, six percent. More than 30 distinct languages are spoken in children’s homes.

Large private, charter or home school enrollment. The balance of school age children not enrolled in the public system is just over 2,300 students.

INCREASE IN RESIDENTS WITH AN ASSOCIATES DEGREE

+30%

Educational attainment has increased, especially in residents with at least an Associate Degree

TOTAL ENROLLMENT PRIMARY & SECONDARY SCHOOL

16,002

With just over 13,500 enrolled in public school the remaining school-age population attend either private, charter or home schools

University of Georgia is a key community driver. The University, its 36,000 students, 10,655 faculty and staff and more than 170 majors and degree programs are a key community driver. One of the larger research institutions in the country, each year the University tallies just over $200 million in research and development funding and collects $6.6 million in intellectual property income. As one of the original Land Grant Colleges established with the Morrill Act, the institution has a strong focus in Agriculture and Environmental Sciences. Of the 193 plant patents granted in Georgia from 2010 Clarke County represented 10 percent of the total, no doubt as a result of research work of the UGA Agriculture program.

LANGUAGES SPOKEN AT HOME

30

There dozens of languages spoken in the homes of children in the public school system

TOTAL ENROLLMENT POST-SECONDARY ALL INSTITUTIONS

41,000

Between the University of Georgia, Athens Tech and Piedmont College Athens hosts a large number of college students

ADULT OBESITY

1 in 4

In a state with high levels of adult obesity (29 percent) the County has improved but still exceeds national averages

ADULT SMOKING

20%

Regular adult smoking average higher than the state’s 17 percent

TEEN BIRTHS PER 1,000

22

Teen pregnancies are less frequent in the county comparing to state average of 42 per 1,000 in the population

HEALTH & WELLNESS

Decreasing instances of adult obesity. From a high of 28 percent in 2012, obesity among adults has decreased each year to 25 percent in 2016. Obesity greatly increases the likelihood of heart disease, type 2 diabetes and certain types of cancer.

Smoking rates and instances of excessive drinking higher than the state. The percentage of residents who smoke regularly, 20 percent, is three points higher than the state average of 17 percent. Excessive drinking instances for individuals increased from 15 percent in 2012 to 17 percent in 2016.

Higher instances of food insecurity and limited access to healthy foods. Food insecurity, 22 percent, is higher than state average 19. 21 percent say they do not have access to healthy foods, 8 percent Georgia.

Active Transportation and Health

The American Planning Association has identified cycling infrastructure as one of the simplest methods for confronting community health issues like obesity, and inactivity. Athens has an increasing vibrant biking culture and is expanding its bike-specific infrastructure.
**4. Place**

Athens-Clarke County is a beautiful community with a wide range of places and environments. It’s also small. Of Georgia’s 159 counties, Athens is the smallest by ten square miles. This limitation alone, poses a significant challenge. When combined with the community’s support for rural preservation, there are fewer and fewer easy areas for expansion. This has driven positive trends like reinvestment in the downtown and infill development, but also contributed to concerns over housing availability and affordability. The Place section reviews the character of county’s places, analyzes mobility and describes the key conditions and trends for housing.

**Key Findings**

The following are key points from the place-based research of the county.

<table>
<thead>
<tr>
<th>TOTAL LAND AREA</th>
<th>PERCENTAGE WORKFORCE HOUSING</th>
<th>LARGE RURAL PREERVE</th>
</tr>
</thead>
<tbody>
<tr>
<td>122 sq mi</td>
<td>11%</td>
<td>28,000</td>
</tr>
</tbody>
</table>

Of Georgia’s 159 counties, Athens-Clarke is the smallest by more than ten square miles.

Between 2005 and 2015, a small share of workforce housing constructed, majority of growth in student, multifamily.

Around 38 percent of the county of the county is classified into a rural zone, which limits subdivision / development.

**Development Character**

**A variety of place types.** From the fully urban environment of downtown to the secluded rural areas at the edges of the county, Athens-Clarke has a wide variety of place types. The look and feel of these environments vary based on density, size and scale of development, as well as their mix of uses therein. There are four basic place types that have been explored in the graphic to right and mapped on the following page. These include the Urban, Suburban, Rural Edge and Rural places. The boundary between these types is not hard or fixed. Rather, there is a gradual curve from the dense urban core toward the rural areas. This transect, or variety of places, is unique for a community of this size and is a central asset of the county.

- **Urban**: Walkable, mix of uses, grid streets, tall, dense, dynamic, and the center of activity. Can also include close in neighborhoods.
- **Suburban**: Auto-dependent, separation of uses, mixed density, single use focus including residential, commercial and industrial.
- **Rural Edge**: Transition from suburban areas to fully rural, primarily residential, intermittant buildings on large lots.
- **Rural**: Conserved land, waterways, natural areas, or agricultural land at the far edges of the county some in permanent preserve.
Beyond the denser development in the urban and suburban areas, fingers of residential development weave into the more rural areas of the county. These places are very sparsely developed, and separated by large tree stands, or agricultural fields.

**Urban**

The urban places in the county are clustered within Downtown and the UGA campus. Several of the adjoining Downtown neighborhoods also fit the definition. These places are where some of the first, pre-automobile, development took place, hence their walkability. In most cases, urban places bleed into the suburban place type.

**Suburban**

The suburban place type encompasses a large portion of the developed part of the county. These areas tend to include post-war development that is more auto-oriented and less walkable. The neighborhoods well beyond downtown, commercial areas along Atlanta Highway and Lexington Road, or industrial development throughout the county all fit this category.

**Rural**

The far edges of the county, are made up of rural areas with large lots, working agricultural lands, or open areas. Intermittent residential developments sit on large lots and are not served with utilities like water and sewer.
Market heating up, but mostly in multi-family construction. Residential construction has seen a significant recovery since the low set during the recession. Much of this construction has been focused into multi-family projects. From 2011, 72 individual multi-family projects added just over 1,500 units to the market. Over this same period, 653 single-family permits were pulled. In competitive markets, a higher share of permits are being issued to single-family projects. In 2015, 97 percent of permits (totaling $79 million in investment) were issued in Oconee County. In Athens, this was 27 percent or $22 million. The rate of construction for single-family housing actually decreased 27 percent from the year previous.

Most new multifamily housing is student apartments. Between 2005-2015, there were 19 apartment developments with 2,255 new units built in Athens. 67 percent of those units are considered student apartments or housing. Students living in non-group quarters or in off-campus housing are typically counted in all census measures including poverty statistics.

There is a need for workforce and senior housing. Only 11 percent of multifamily units built between 2005-2015 are considered workforce housing. Along with this, the zero percent vacancy rate for senior housing in the community indicates an un-met demand.

There are limited housing options for households earning 60-120 percent of median income. 64 percent of households make less than $50,000 per year. With a median family income of $32,162, affordable rent would equal $804 and an affordable home price would be between $130k-150k (depending on interest rates and available down payment). With the average sales price for all home types $200,400 and $338,028 for new construction there is a gap between affordability and availability.

Source: Athens-Clarke County Workforce Housing Comprehensive Assessment, American Communities Survey
PARKS, PATHS & OPEN SPACE

Wealth of natural, open spaces and agricultural heritage. The county enjoys a unique mix of environments from a fully urban downtown to untouched natural and rural areas on its periphery. Stream corridors snake from north to south, meeting to form the southern border of the county, the Oconee River. In the hillier areas there are woodlots, cut into by valleys of small-acreage agriculture. Designated park areas surround the center of the county, mostly along one of the major stream corridors.

Large park system with expanding trail network. The County’s Leisure Service Department maintains more than 2,000 acres of parks and recreational facilities along with 37 miles of trails. The recently completed Greenways Master Plan update includes a number of recommendations for new trails and park space. Park areas, however, are not evenly distributed. The downtown areas have limited access to green spaces. This is slowly changing with improvements to the North Oconee River Corridor.

A focus on greenway and stream corridor protection. The County completed its first greenway plan in 2003, recommending a number of conservation and protection principles for its many streams and tributaries. The plan also introduced an evaluation technique to identify a hierarchy of streams and related protections. This plan has been updated in 2016, including new and proposed trail projects along major greenways. These have been included in the map below.
MOBILITY

A robust and proactive transit system. The county is served by two fixed-route transit service providers in Athens Transit and the University of Georgia. Athens Transit is a leader in comparably sized systems and won the 2016 award for Urban Community Transportation System of the Year. The system operates 19 routes, serves more than 1.7 million passenger trips annually, and has a service area population of 116,714. The UGA system serves the campus areas, along with several spurs to neighboring student apartment complexes.

Potential to improve service by studying under served but high potential ridership neighborhoods. In its 2016 Athens Transit Feasibility Study, several areas of the county were identified as having a high propensity for transit use, but a lack of frequent or available service. This map is included on the bottom right.

Expansion of cycling infrastructure and advocacy. On street infrastructure for cycling (bike lanes, painted sharrows, etc.) has become more common on major corridors and in Downtown. The Bike-Pedestrian Master Plan, launching in 2017, will seek to align major initiatives and develop high priority projects and programs. Safety is a primary concern. Bicycle injury accidents have increased 312 percent from 2012 to 2015.

Six corridor types identified in County Corridor Management Strategy. The County’s roadway network includes roughly 600 miles of the paved roads. The 2006 Corridor Plan divided these into three basic types, urban, suburban and rural or scenic streets. Urban corridors were those with higher density, more pedestrian activity, and more intense commercial and residential uses. Suburban corridors were higher volume, lower density. And Rural or Scenic corridors connected areas on the periphery.

The Athens Multi-Modal Transit Center Completed in 2006, the $4.5m Transit Center was built to increase rideshare opportunities between the various systems (community and regional) operating in the County.

**FIG 12. NEW POTENTIAL RIDERSHIP MAP**

<table>
<thead>
<tr>
<th>MILES OF LOCALLY MAINTAINED ROADS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>537</strong></td>
</tr>
<tr>
<td>The county maintains local roads, there are 56 miles of state routes maintained by Georgia DOT</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>BICYCLE INJURY ACCIDENTS CHANGE FROM 2012 - 15</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>+312%</strong></td>
</tr>
<tr>
<td>Both pedestrian and bicycle injury accidents have increased from 2012, pedestrian accidents up 81 percent</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CHANGE IN YOUTH RIDERSHIP FROM 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>+470%</strong></td>
</tr>
<tr>
<td>Students from kindergarten to 12th grade now ride for free on the Athens Transit system</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ANNUAL PASSENGER TRIPS ATHENS TRANSIT SYSTEM</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1.7M</strong></td>
</tr>
<tr>
<td>Down slightly, -6.7 percent, from a high in 2009 of 1.8m trips</td>
</tr>
</tbody>
</table>

Source: Athens Transit Feasibility Study (2016)
FIG 13. FUTURE DEVELOPMENT MAP

Source: Athens-Clarke County Department of Planning

FUTURE LAND USES
- Community Center Mixed Use
- Community Institutional
- Corridor Business
- Corridor Residential
- Downtown
- Employment
- Government
- Main Street Business
- Neighborhood Mixed Use
- Other Parks and Open Space
- Public Owned Parks and Open Space
- Residential Mixed Use
- Rural
- Rural Residential
- Single family Residential
- Traditional Neighborhood
- Transportation / Utilities
- University District

ADDITIONAL MAP ITEMS
- Street
- Water
- Other Jurisdiction
LAND USE & DEVELOPMENT POTENTIAL

2008 Comprehensive Plan identified three major character areas to direct growth and development. The plan identified a rural zone (limited to no growth), a “Greater Athens”, and “Traditional Athens” zone. Growth and development was recommended to take place at key nodes and either serve a neighborhood (small scale) or the community (large scale). Gateways would be defined at each character area boundary to develop a more defined boundary between types.

The “Rural” zone functionally preserves 38 percent of the county, mostly along the periphery. The 2014 Zoning Amendment formally designated roughly 28,000 acres as rural residential, limiting development to one unit per ten acres. This has effectively halted the subdivision and development of land in these areas.

Limited number of marketed industrial and commercial land and property. There are 39 sites totaling 365 acres of available (actively marketed) land in the County. 62 percent are less than five acres in size. Only nine properties are more than ten acres. There are 47 properties totaling 550k square feet of available industrial and commercial building space in the County. 68 percent of the space is less than 10k sq ft in size, with very little contemporary flex space available.

By 2020, 253 parcels or 411 acres of land will shift into a timely state for redevelopment. In a 2007 development analysis, identified a great deal of opportunity for redevelopment in the 2010’s and 2020’s. Parcels were evaluated based on a land value ratio to determine which properties would be primed for redevelopment and when. The cumulative value of eligible property primed by 2020 was equal to $100 million in land value, with a potential recaptured improvement value of $145 million. As greenfield sites become scarcer, redevelopment will be increasingly important.

TOTAL REDEVELOPMENT VALUE (LAND & PROPERTY) 2020

$245M

More than 250 parcels will be primed for redevelopment 2020, representing $100 million in land value, and $145 in property value

TOTAL MARKETED ACERAGE

365

As of first quarter 2017 there were 39 total sites being actively marketed in the county, 62 percent of these were less than five acres.